

# **EXHIBIT**

## **A**

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TSDR FAQ'S

TSDR now includes a Post Registration Maintenance Tab. When viewing a Registered mark, users will now find a new 3rd tab providing Post Registration information next to the "Status" and "Document" tabs, below the search text box. The tab will not appear if the mark is not registered.

Trademark Status & Document Retrieval (TSDR)

SEARCHMULTI-SEARCH

US Serial, Registration, or Reference No.76687945StatusDocuments

Status results found

STATUSDOCUMENTSMAINTENANCE

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Mark: COACHSOURCE

US Serial Number: 76687945Application Filing Date: Mar. 21, 2008

US Registration Number: 3539223Registration Date: Dec. 02, 2008

Register: Principal

Mark Type: Service Mark

TM5 Common Status Descriptor: LIVE/REGISTRATION/Issued and Active

The trademark application has been registered with the Office.

Status: A Section 8 declaration has been accepted.

Status Date: Jun. 28, 2014

Publication Date: Sep. 16, 2008

Mark Information

Goods and Services

Basis Information (Case Level)

Current Owner(s) Information

Attorney/Correspondence Information

Prosecution History

Maintenance Filings or Post Registration Information

TM Staff and Location Information

Assignment Abstract Of Title Information - Click to Load

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**Int. Cl.: 41**

**Prior U.S. Cls.: 100, 101 and 107**

**United States Patent and Trademark Office**

**Reg. No. 3,539,223**

Registered Dec. 2, 2008

**SERVICE MARK  
PRINCIPAL REGISTER**

**COACHSOURCE**

COACHSOURCE, LLC (NEW JERSEY LIMITED  
LIABILITY COMPANY)  
673 DAKOTA TRAIL  
FRANKLIN LAKES, NJ 07417

THE MARK CONSISTS OF STANDARD CHAR-  
ACTERS WITHOUT CLAIM TO ANY PARTICULAR  
FONT, STYLE, SIZE, OR COLOR.

FOR: PROFESSIONAL COACHING SERVICES  
FOR BUSINESS EXECUTIVES IN THE FIELD OF  
LEADERSHIP, IN CLASS 41 (U.S. CLS. 100, 101 AND  
107).

SER. NO. 76-687,945, FILED 3-21-2008.

FIRST USE 1-1-2006; IN COMMERCE 1-1-2006.

ROBIN CHOSID, EXAMINING ATTORNEY







## USPTO TSDR Case Viewer



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Case Id

76687945

Document Description

1. Notice Of Acceptance

Mail/Create Date

Jun. 28, 2014

Prev Doc

1

of

1

Next Doc

**From:** TMOOfficialNotices@USPTO.GOV  
**Sent:** Saturday, June 28, 2014 11:00 PM  
**To:** steve@coachsource.com  
**Cc:** angie@coachsource.com  
**Subject:** Official USPTO Notice of Acceptance Section 8: U.S. Trademark RN 3539223: COACHSOURCE

**Serial Number:** 76687945  
**Registration Number:** 3539223  
**Registration Date:** Dec 2, 2008  
**Mark:** COACHSOURCE  
**Owner:** COACHSOURCE. LLC

Jun 28, 2014

**NOTICE OF ACCEPTANCE UNDER SECTION 8**

The declaration of use or excusable nonuse filed for the above-identified registration meets the requirements of Section 8 of the Trademark Act, 15 U.S.C. §1058. **The Section 8 declaration is accepted.**

**The registration will remain in force for the class(es) listed below for the remainder of the ten-year period, calculated from the registration date, unless canceled by an order of the Commissioner for Trademarks or a Federal Court.**

**Class(es):**  
041

TRADEMARK SPECIALIST  
POST-REGISTRATION DIVISION  
571-272-9500

**REQUIREMENTS FOR MAINTAINING REGISTRATION**

**WARNING: Your registration will be canceled if you do not file the documents below during the specified time periods.**

**Requirements in the First Ten Years**

**What and When to File:** You must file a declaration of use (or excusable nonuse) **and** an application for renewal between the 9th and 10th years after the registration date. See 15 U.S.C. §§1058, 1059.

**Requirements in Successive Ten-Year Periods**

**What and When to File:** You must file a declaration of use (or excusable nonuse) **and** an application for renewal between every 9th and 10th-year period, calculated from the registration date. See 15 U.S.C. §§1058, 1059.

**Grace Period Filings**

The above documents will be considered as timely if filed within six months after the deadlines listed above with the payment of an additional fee.

**\*\*\*The USPTO WILL NOT SEND ANY FURTHER NOTICE OR REMINDER OF THESE REQUIREMENTS. THE REGISTRANT SHOULD CONTACT THE USPTO ONE YEAR BEFORE THE EXPIRATION OF THE TIME PERIODS SHOWN ABOVE TO DETERMINE APPROPRIATE REQUIREMENTS AND FEES.\*\*\***

To view this notice and other documents for this application on-line, go to <http://tdr.uspto.gov/search.action?sn=76687945>. NOTE: This notice will only be available on-line the next business day after receipt of this e-mail

# **EXHIBIT**

## **B**



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PATENT AND TRADEMARK OFFICE

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Trademark Status & Document Retrieval (TSDR)

SEARCHMULTI-SEARCH

US Serial, Registration, or Reference No.87218584StatusDocuments

Status results found

STATUSDOCUMENTSMAINTENANCE

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Mark: COACHSOURCE

CoachSource

US Serial Number:	87218584	Application Filing Date:	Oct. 27, 2016
US Registration Number:	5222152	Registration Date:	Jun. 13, 2017
Filed as TEAS Plus:	Yes	Currently TEAS Plus:	Yes
Register:	Principal		
Mark Type:	Trademark, Service Mark		
TM5 Common Status Descriptor:	<div><div></div><div>LIVE/REGISTRATION/Issued and Active</div><div>The trademark application has been registered with the Office.</div></div>		
Status:	Registered. The registration date is used to determine when post-registration maintenance documents are due.		
Status Date:	Jun. 13, 2017		
Publication Date:	Mar. 28, 2017		

▲ Mark Information

▲ Related Properties Information

▲ Goods and Services

▲ Basis Information (Case Level)

▲ Current Owner(s) Information

▲ Attorney/Correspondence Information

▲ Prosecution History

▲ TM Staff and Location Information

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If you are the applicant or the applicant's attorney and have questions about this file, please contact the Trademark Assistance Center



TSDR now includes a Post Registration Maintenance Tab. When viewing a Registered mark, users will now find a new 3rd tab providing Post Registration information next to the "Status" and "Document" tabs, below the search text box. The tab will not appear if the mark is not registered.

Trademark Status & Document Retrieval (TSDR)

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US Serial, Registration, or Reference No.87218584StatusDocuments

Status results found


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Mark: COACHSOURCE

CoachSource

US Serial Number:	87218584	Application Filing Date:	Oct. 27, 2016
US Registration Number:	5222152	Registration Date:	Jun. 13, 2017
Filed as TEAS Plus:	Yes	Currently TEAS Plus:	Yes
Register:	Principal		
Mark Type:	Trademark, Service Mark		
TM5 Common Status Descriptor:	<div>LIVE/REGISTRATION/Issued and Active</div> <div>The trademark application has been registered with the Office.</div>		
Status:	Registered. The registration date is used to determine when post-registration maintenance documents are due.		
Status Date:	Jun. 13, 2017		
Publication Date:	Mar. 28, 2017		

- ▲ Mark Information
- ▲ Related Properties Information
- ▲ Goods and Services
- ▲ Basis Information (Case Level)
- ▲ Current Owner(s) Information
- ▲ Attorney/Correspondence Information
- ▼ Prosecution History
- Expand All

Date	Description	Proceeding Number
Jun. 13, 2017	REGISTERED-PRINCIPAL REGISTER	
Mar. 28, 2017	OFFICIAL GAZETTE PUBLICATION CONFIRMATION E-MAILED	
Mar. 28, 2017	PUBLISHED FOR OPPOSITION	
Mar. 08, 2017	NOTIFICATION OF NOTICE OF PUBLICATION E-MAILED	
Feb. 13, 2017	APPROVED FOR PUB - PRINCIPAL REGISTER	
Feb. 03, 2017	ASSIGNED TO EXAMINER	82432



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Case Id	Document Description	Mail/Create Date	Prev Doc	Next Doc
87218584	1. Registration Certificate	Jun. 13, 2017		

United States of America  
United States Patent and Trademark Office

CoachSource

Reg. No. 5,222,152  
Registered Jun. 13, 2017  
Int. Cl.: 9, 16, 41  
Service Mark  
Trademark  
Principal Register

CoachSource, LLC (NEW JERSEY LIMITED LIABILITY COMPANY)  
673 Dakata Trail  
Franklin Lakes, NJ 07417

CLASS 9: Digital materials, namely, downloadable articles, downloadable checklists, downloadable audios, and downloadable videos featuring information for executives regarding leadership coaching

FIRST USE 1-1-2006; IN COMMERCE 1-1-2006

CLASS 16: Printed materials, namely, written articles in the field of leadership coaching for executives.; Printed publications, namely, brochures, booklets, and teaching materials in the field of leadership coaching for executives.; Printed training materials in the field of leadership coaching for executives

FIRST USE 1-1-2006; IN COMMERCE 1-1-2006

CLASS 41: Education services, namely, providing on-line and face to face classes, workshops, seminars, webinars in the field of leadership coaching for executives.; Educational services, namely, providing educational speakers in the field of leadership coaching for executives

FIRST USE 1-1-2006; IN COMMERCE 1-1-2006

THE MARK CONSISTS OF STANDARD CHARACTERS WITHOUT CLAIM TO ANY PARTICULAR FONT STYLE, SIZE OR COLOR

OWNER OF U.S. REG. NO. 3539223

SER. NO. 87-218,584, FILED 10-27-2016  
JAMES W MACFARLANE, EXAMINING ATTORNEY



Joseph Matol  
Performing the Functions and Duties of the  
Under Secretary of Commerce for  
Intellectual Property and Director of the  
United States Patent and Trademark Office

# **EXHIBIT**

# **C**



# United States of America

## United States Patent and Trademark Office

### CoachSource Cloud

**Reg. No. 5,145,567**

**Registered Feb. 21, 2017**

**Int. Cl.: 42**

**Service Mark**

**Principal Register**

COACHSOURCE, LLC (NEW JERSEY LIMITED LIABILITY COMPANY)  
673 Dakota Trail  
Franklin Lakes, NJ 07417

CLASS 42: Software as a service (SAAS) services featuring cloud based software for tracking executive coaching engagements

FIRST USE 1-1-2010; IN COMMERCE 1-1-2010

THE MARK CONSISTS OF STANDARD CHARACTERS WITHOUT CLAIM TO ANY PARTICULAR FONT STYLE, SIZE OR COLOR

No claim is made to the exclusive right to use the following apart from the mark as shown: "CLOUD"

SER. NO. 87-085,414, FILED 06-27-2016  
MARIA VICTORIA SUAREZ, EXAMINING ATTORNEY



*Michelle K. Lee*

Director of the United States  
Patent and Trademark Office

**REQUIREMENTS TO MAINTAIN YOUR FEDERAL TRADEMARK REGISTRATION**

**WARNING: YOUR REGISTRATION WILL BE CANCELLED IF YOU DO NOT FILE THE DOCUMENTS BELOW DURING THE SPECIFIED TIME PERIODS.**

**Requirements in the First Ten Years\***

**What and When to File:**

- **First Filing Deadline:** You must file a Declaration of Use (or Excusable Nonuse) between the 5th and 6th years after the registration date. See 15 U.S.C. §§1058, 1141k. If the declaration is accepted, the registration will continue in force for the remainder of the ten-year period, calculated from the registration date, unless cancelled by an order of the Commissioner for Trademarks or a federal court.
- **Second Filing Deadline:** You must file a Declaration of Use (or Excusable Nonuse) and an Application for Renewal between the 9th and 10th years after the registration date.\* See 15 U.S.C. §1059.

**Requirements in Successive Ten-Year Periods\***

**What and When to File:**

- You must file a Declaration of Use (or Excusable Nonuse) and an Application for Renewal between every 9th and 10th-year period, calculated from the registration date.\*

**Grace Period Filings\***

The above documents will be accepted as timely if filed within six months after the deadlines listed above with the payment of an additional fee.

**\*ATTENTION MADRID PROTOCOL REGISTRANTS:** The holder of an international registration with an extension of protection to the United States under the Madrid Protocol must timely file the Declarations of Use (or Excusable Nonuse) referenced above directly with the United States Patent and Trademark Office (USPTO). The time periods for filing are based on the U.S. registration date (not the international registration date). The deadlines and grace periods for the Declarations of Use (or Excusable Nonuse) are identical to those for nationally issued registrations. See 15 U.S.C. §§1058, 1141k. However, owners of international registrations do not file renewal applications at the USPTO. Instead, the holder must file a renewal of the underlying international registration at the International Bureau of the World Intellectual Property Organization, under Article 7 of the Madrid Protocol, before the expiration of each ten-year term of protection, calculated from the date of the international registration. See 15 U.S.C. §1141j. For more information and renewal forms for the international registration, see <http://www.wipo.int/madrid/en/>.

**NOTE: Fees and requirements for maintaining registrations are subject to change. Please check the USPTO website for further information. With the exception of renewal applications for registered extensions of protection, you can file the registration maintenance documents referenced above online at <http://www.uspto.gov>.**

**NOTE: A courtesy e-mail reminder of USPTO maintenance filing deadlines will be sent to trademark owners/holders who authorize e-mail communication and maintain a current e-mail address with the USPTO. To ensure that e-mail is authorized and your address is current, please use the Trademark Electronic Application System (TEAS) Correspondence Address and Change of Owner Address Forms available at <http://www.uspto.gov>.**



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**Mark:** COACHSOURCE CLOUD

CoachSource Cloud

**US Serial Number:** 87085414

**Application Filing Date:** Jun. 27, 2016

**US Registration Number:** 5145567

**Registration Date:** Feb. 21, 2017

**Filed as TEAS Plus:** Yes

**Currently TEAS Plus:** Yes

**Register:** Principal

**Mark Type:** Service Mark

**Status:** Registered. The registration date is used to determine when post-registration maintenance documents are due.

**Status Date:** Feb. 21, 2017

**Publication Date:** Dec. 06, 2016

## Mark Information

**Mark Literal Elements:** COACHSOURCE CLOUD

**Standard Character Claim:** Yes. The mark consists of standard characters without claim to any particular font style, size, or color.

**Mark Drawing Type:** 4 - STANDARD CHARACTER MARK

**Disclaimer:** "CLOUD"

## Goods and Services

**Note:** The following symbols indicate that the registrant/owner has amended the goods/services:

- Brackets [...] indicate deleted goods/services;
- Double parenthesis ((...)) identify any goods/services not claimed in a Section 15 affidavit of incontestability; and
- Asterisks \*.\* identify additional (new) wording in the goods/services.

**For:** Software as a service (SAAS) services featuring cloud based software for tracking executive coaching engagements

**International Class(es):** 042 - Primary Class

**U.S Class(es):** 100, 101

**Class Status:** ACTIVE

**Basis:** 1(a)

**First Use:** Jan. 01, 2010

**Use in Commerce:** Jan. 01, 2010

## Basis Information (Case Level)

**Filed Use:** Yes

**Currently Use:** Yes

**Amended Use:** No

**Filed ITU:** No

**Currently ITU:** No

**Amended ITU:** No

**Filed 44D:** No

**Currently 44D:** No

**Amended 44D:** No

**Filed 44E:** No

**Currently 44E:** No

**Amended 44E:** No

**Filed 66A:** No

**Currently 66A:** No

**Filed No Basis:** No

**Currently No Basis:** No

## Current Owner(s) Information

**Owner Name:** COACHSOURCE, LLC

**Owner Address:** 673 Dakota Trail  
Franklin Lakes, NEW JERSEY 07417

UNITED STATES

Legal Entity Type: LIMITED LIABILITY COMPANY

State or Country NEW JERSEY  
Where Organized:**Attorney/Correspondence Information****Attorney of Record**

Attorney Name: Francine D. Ward, Esq.

Attorney Primary Email Address: [Info@fwardattorney.com](mailto:Info@fwardattorney.com)Attorney Email Yes  
Authorized:**Correspondent**Correspondent Name/Address: Francine D. Ward, Esq.  
Law fc. Of Francine D. Ward  
775 East Blithedale, Ste. 325  
Mill Valley, CALIFORNIA 94941  
UNITED STATES

Phone: 415-389-0975

Correspondent e-mail: [Info@fwardattorney.com](mailto:Info@fwardattorney.com)Correspondent e-mail Yes  
Authorized:**Domestic Representative - Not Found****Prosecution History**

Date	Description	Proceeding Number
Feb. 21, 2017	REGISTERED-PRINCIPAL REGISTER	
Dec. 06, 2016	OFFICIAL GAZETTE PUBLICATION CONFIRMATION E-MAILED	
Dec. 06, 2016	PUBLISHED FOR OPPOSITION	
Nov. 16, 2016	NOTIFICATION OF NOTICE OF PUBLICATION E-MAILED	
Nov. 03, 2016	LAW OFFICE PUBLICATION REVIEW COMPLETED	66121
Oct. 29, 2016	ASSIGNED TO LIE	66121
Oct. 17, 2016	APPROVED FOR PUB - PRINCIPAL REGISTER	
Oct. 14, 2016	ATTORNEY/DOM.REP.REVOKED AND/OR APPOINTED	
Oct. 14, 2016	TEAS REVOKE/APP/CHANGE ADDR OF ATTY/DOM REP RECEIVED	
Oct. 14, 2016	TEAS/EMAIL CORRESPONDENCE ENTERED	88889
Oct. 13, 2016	CORRESPONDENCE RECEIVED IN LAW OFFICE	88889
Oct. 13, 2016	TEAS RESPONSE TO OFFICE ACTION RECEIVED	
Oct. 12, 2016	NOTIFICATION OF NON-FINAL ACTION E-MAILED	6325
Oct. 12, 2016	NON-FINAL ACTION E-MAILED	6325
Oct. 12, 2016	NON-FINAL ACTION WRITTEN	76625
Oct. 04, 2016	ASSIGNED TO EXAMINER	76625
Jul. 01, 2016	NOTICE OF PSEUDO MARK E-MAILED	
Jun. 30, 2016	NEW APPLICATION OFFICE SUPPLIED DATA ENTERED IN TRAM	
Jun. 30, 2016	NEW APPLICATION ENTERED IN TRAM	

**TM Staff and Location Information****TM Staff Information - None****File Location**

Current Location: PUBLICATION AND ISSUE SECTION

Date in Location: Feb. 21, 2017



# United States of America

## United States Patent and Trademark Office

### CoachSource Cloud

**Reg. No. 5,145,567**

COACHSOURCE, LLC (NEW JERSEY LIMITED LIABILITY COMPANY)

**Registered Feb. 21, 2017**

673 Dakota Trail

Franklin Lakes, NJ 07417

**Int. Cl.: 42**

CLASS 42: Software as a service (SAAS) services featuring cloud based software for tracking executive coaching engagements

**Service Mark**

FIRST USE 1-1-2010; IN COMMERCE 1-1-2010

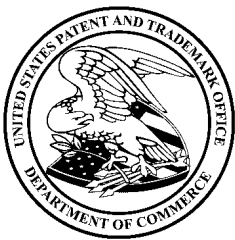
**Principal Register**

THE MARK CONSISTS OF STANDARD CHARACTERS WITHOUT CLAIM TO ANY PARTICULAR FONT STYLE, SIZE OR COLOR

No claim is made to the exclusive right to use the following apart from the mark as shown:  
"CLOUD"

SER. NO. 87-085,414, FILED 06-27-2016

MARIA VICTORIA SUAREZ, EXAMINING ATTORNEY



*Michelle K. Lee*

Director of the United States  
Patent and Trademark Office

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# **EXHIBIT**

# **D**

[Executive Coaching Solutions](#)[C-Suite](#)[Results](#)[The Coaches](#)[About](#)[Blog](#)

# Downloads

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Please enjoy these **free** downloads, compliments of CoachSource, LLC!

- **Current CoachSource Brochure:** This informative and handy 8-page brochure gives you an executive-level overview of who we are and the services we provide.
- **CoachSource Coaching Design Checklist:** Anyone responsible for executive coaching in his/her organization will benefit from this checklist. We have compiled all the key questions that must be asked for any executive coaching effort to be successful.
- **Measuring the Impact and Results of Executive Coaching:** Part of Dr. Underhill's presentation at the 2016 World Business Executive Coach Summit
- **How Corporations Find Executive Coaches:** Part of Dr. Underhill's presentation at the 2015 European Mentoring and Coaching Council in Turkey.
- **Key Takeaways from TCB Coaching Conference:** Part of a 2015 presentation with some thought-provoking questions.
- **Executive Coaching Industry Research:** Please view our [research page](#) for complete information and the link to download this comprehensive 42-page report.

## Contact Us

**Call today for more information**  
on how CoachSource can energize  
your executive coaching  
programs.

US Pacific +1 408 490 0490  
US Eastern +1 201 847 0442  
Hong Kong +852 8170 0143  
UK +44 020 3290 6119

## Connect With Us

[info@coachsource.com](mailto:info@coachsource.com)





Measurement! Measuring the impact of coaching is simple, obtainable and even motivational for our clients. Learn about the 5 levels of measurement – including measuring ROI – and figure out how to put them into practice with your clients immediately.

### **Executive Coaching for Results: Design, Measure, Maximize**

Audience: HR/LD/Coaches

Corporate executive coaching requests have risen substantially over the past few years, now mostly aimed at the best and brightest talent. But there is an unexpected downside - the challenge in properly managing coaching. Practice managers in corporations are now spending extraordinarily large amounts of time screening coaches, handling new requests, tracking activities, processing purchase orders and expense forms, keeping up with the existing cadre of coaches - and do the rest of their work too!

With this increased attention also comes heightened pressure to demonstrate results. Are our leaders actually improving? How do we measure the impact of coaching? How do we measure the return on investment?

This vital session is perfectly timed to meet the needs of busy coaching program managers. Can we manage larger and larger coaching programs, using less internal staff time along the way? Participants will learn how to:

- Streamline “intake” of coaching requests to move them through the system faster
- Oversee internal and external coaches under one approach
- Peek inside a web-based coaching management system (CMS)
- Determine which key activity metrics to track: i.e. number of assignments, cost, etc
- Identify the five ways to evaluate coaching
- Conduct a coaching conversation to contract for business impact
- Convert data to monetary value

Join coaching management expert Brian O. Underhill, Ph.D. and his team as we explore ways to maximize your coaching program. Brian has designed numerous large-scale, global coaching programs, and his staff oversees coaching management activities at over 60 large organizations.

[Contact us](#) to learn more!



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# Speaking

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## Contact Us

**Call today for more information**  
on how CoachSource can energize  
your executive coaching  
programs.

US Pacific +1 408 490 0490  
US Eastern +1 201 847 0442  
Hong Kong +852 8170 0143  
UK +44 020 3290 6119

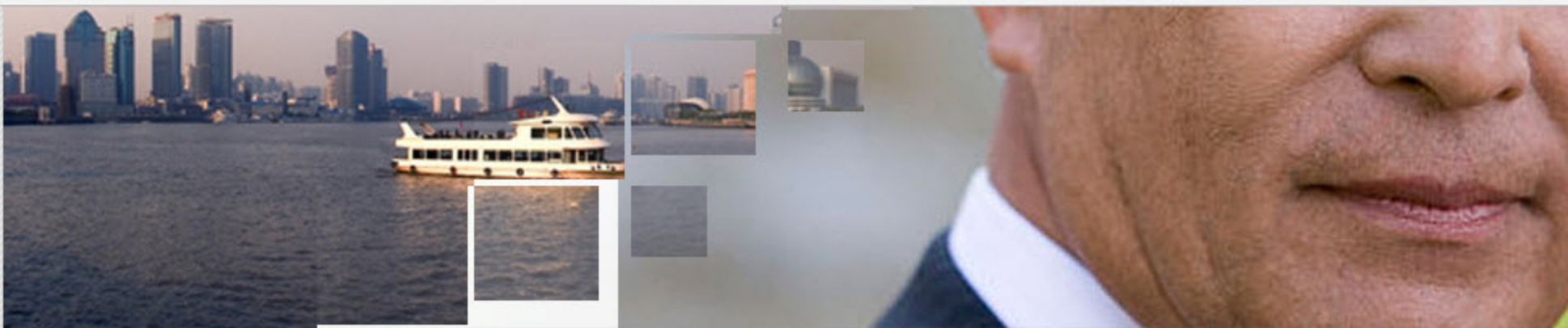
## Connect With Us

[info@coachsource.com](mailto:info@coachsource.com)





← → ↻ ⓘ coachsource.com



# CoachSource is the world's most experienced leadership coaching company.

At CoachSource, executive coaching is our passion. Our worldwide team of coaches develops highly successful leaders, using programs tailored to fit their objectives as well as those of the organizations they manage. It's our job to make hiring and managing coaches easy, while providing all the tools to track results with confidence. We are the recognized experts at what we do. With our guidance you will do more than meet your leadership development goals—you will surpass.

Get Started!

**Request a coach**

## Newsletter Subscription

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07/07/2017



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## A Proven Track Record of Executive Coaching Success

Inspired by the work of Marshall Goldsmith, CoachSource is the only firm officially authorized to carry out the Goldsmith executive coaching process globally. Our process is focused on creating long-term, measurable change in



○ Ask me anything



Snagit Capture



07:09 PM  
07/07/2017





Linkage, ICF, ODN, SHRM, ATD and other industry events. (Pictured above is Dr. Underhill's keynote in Brazil).



Dr. Underhill's keynote at ICF in Istanbul, Turkey

#### Topics:

##### **Endurance Leadership: Leading in Turbulent Times**

Audience: Leaders (Keynote)

During these unprecedented times, how are we to lead our organizations effectively? What leadership approaches do we need in



Measurement! Measuring the impact of coaching is simple, obtainable and even motivational for our clients. Learn about the 5 levels of measurement – including measuring ROI – and figure out how to put them into practice with your clients immediately.

### **Executive Coaching for Results: Design, Measure, Maximize**

Audience: HR/LD/Coaches

Corporate executive coaching requests have risen substantially over the past few years, now mostly aimed at the best and brightest talent. But there is an unexpected downside - the challenge in properly managing coaching. Practice managers in corporations are now spending extraordinarily large amounts of time screening coaches, handling new requests, tracking activities, processing purchase orders and expense forms, keeping up with the existing cadre of coaches - and do the rest of their work too!

With this increased attention also comes heightened pressure to demonstrate results. Are our leaders actually improving? How do we measure the impact of coaching? How do we measure the return on investment?

This vital session is perfectly timed to meet the needs of busy coaching program managers. Can we manage larger and larger coaching programs, using less internal staff time along the way? Participants will learn how to:

- Streamline “intake” of coaching requests to move them through the system faster
- Oversee internal and external coaches under one approach
- Peek inside a web-based coaching management system (CMS)
- Determine which key activity metrics to track: i.e. number of assignments, cost, etc
- Identify the five ways to evaluate coaching
- Conduct a coaching conversation to contract for business impact
- Convert data to monetary value

Join coaching management expert Brian O. Underhill, Ph.D. and his team as we explore ways to maximize your coaching program. Brian has designed numerous large-scale, global coaching programs, and his staff oversees coaching management activities at over 60 large organizations.

[Contact us](#) to learn more!

# **EXHIBIT**

# **E**

Twitter, Inc. [US] twitter.com/1CoachSource

Home Moments Notifications Messages Search Twitter Tweet

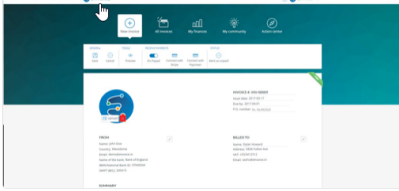
**1CoachSource**  
@1CoachSource  
1 Coach Source is a platform that helps everyone seeking the best coaches and trainers across a broad range of fields.  
United States  
1coachsource.com  
Joined December 2015  
Tweet to 1 Coach Source

74 Photos and videos

TWEETS 492 FOLLOWING 273 FOLLOWERS 148 LIKES 81

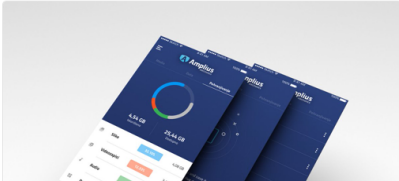
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1 Coach Source Retweeted  
**BetaList** @BetaList · 3h  
Envoice: Simple invoicing for professional freelancers [btl st/2qGp3Kn](#)



173 10

1 Coach Source Retweeted  
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Rubico: A smart keychain produced to help today's smartphone and tablet users  
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**WhatsApp**  
1.69M Tweets

**Google Docs**  
Scam alert: Fake Google Doc emails are circulating the internet

**#MS12017**  
14.9K Tweets

**#FeelSportyWhen**  
3,326 Tweets

**#LicenseToDiscriminate**  
Trump expected to sign anti-LGBT religious exemption order

**Brad Pitt**  
Post-divorce Brad went 'tumbling' across national parks for GQ Style

**Susan Rice**  
17.3K Tweets

**Gmail**  
34.9K Tweets

**#CisionWorldTour**



1coachsource.com/blog/why-get-life-coach-advice

1CS  
Coach Source

HOME ABOUT US HOW IT WORKS CONTACT US BLOG

START COACHING

03 Apr 2017

## Why Get Life Coach Advice?

By : [admin](#) Category : [life-coaching](#).

A life coach works with you to make life genuinely the best fit for you. The mentor helps you pick your way toward satisfaction and prosperity. The solutions of your big questions are inside you. Also, it's the life coach who knows how to draw out your best choices. You will be inspired by coaching to go after your dreams. Life coaching is not merely about feel-good indulgence. It's a legitimate way to self-improvement that is helped infinite individuals around the globe create satisfying lives.

### Do I Need a Life Coach?

On the off chance that you have an inclination that your life is not going the way you need it to, it's a great opportunity to make another plan. A life coach offers significant help as you take stock and set new objectives. You will get great visions about yourself after doing chitchat with a life coach. Coaching is your chance to start seizing every day and supporting a healthy and upbeat future.

### Categories

- Coaching Websites
- Health
- Life Coaching
- Tennis Coaching

### Recent Posts

Federer's Legacy Grows  
February 3, 2017

10 Tips for Effective Business Coaching  
January 27, 2017

Practice Meditation to Relieve Stress  
January 4, 2017

Natural Weight Loss Tips for a Healthy Lifestyle [Info-graphic]  
December 19, 2016

9 Key Benefits of Hiring a Health Coach  
December 7, 2016

### Archives







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**1CoachSource**

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4,408 people like this and 4,402 people follow this

About Typically replies within an hour Send Message See All


**CONTACTS**

- Alexis Lexi Reikward shared APCO International's photo. "Please everyone, take time to do this... can you imagine..."
- Fran Briggs likes Paula Carpenello's post.
- Cathy Dorton Fyock likes Charnd Ann Silbert's post.
- YOUR PAGES SEE ALL
- Francine D. Ward | Busin...
- Richard Lipfield
- You Were Born Healthy
- Janice Gilmore
- Romona Samuels
- Debra J. Gordon
- Stacy Stern
- Alexis Lexi Reikward
- Judy McFarland
- Marquesa Pettway
- Hector Elias
- Joan Rendel Alvarez
- Becky Lancaster-Don...
- Valerie Brown-sistrunk
- Jenn Flaa
- Joanie Siegel

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**1 Coach Source**  
@1CoachSource

1 Coach Source is a platform that helps everyone seeking the best coaches and trainers across a broad range of fields.

United States  
1coachsource.com  
Joined December 2015

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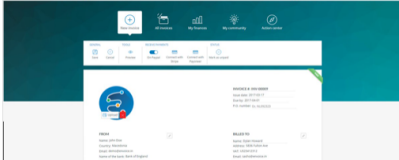
74 Photos and videos

TWEETS 492 FOLLOWING 273 FOLLOWERS 148 LIKES 81

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Tweets Tweets & replies Media

1 Coach Source Retweeted  
**BetaList** @BetaList · 3h  
Envoice: Simple invoicing for professional freelancers [bit.ly/2qSp3Kn](#)



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Follow

**SIB** @SIB\_ipfirm  
Followed by Alistair Forster and others  
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**Tanja Playner PopArt** @t...  
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Trends · Change



# **EXHIBIT**

# **F**



# COACHSOURCE™

Executive Coaching Excellence

Wednesday, May 10, 2017

[info@1coachsource.com](mailto:info@1coachsource.com)

Re: 1CoachSource

Dear 1CoachSource,

My name is Stephen Sass, Managing Partner and CFO of *CoachSource, LLC* (the “Company”). The Company is the owner of two trademark registrations: **CoachSource®** (Reg. No. 3539223) registered on June 28, 2014 and **CoachSource Cloud®** (Reg. No 5145567) registered on February 21, 2017.

The Company is also the owner of the **CoachSource** application (Serial No. 87218584), in connection with:

- Class 9. digital materials, namely, downloadable articles, downloadable checklists, downloadable audios, and downloadable videos featuring information for executives regarding leadership coaching;
- Class 16. printed materials, namely, written articles in the field of leadership coaching for executives; Printed publications, namely, brochures, booklets, and teaching materials in the field of leadership coaching for executives; Printed training materials in the field of leadership coaching for executives, and
- Class 41. education services, namely, providing on-line and face to face classes, workshops, seminars, webinars in the field of leadership coaching for executives; Educational services, namely, providing educational speakers in the field of leadership coaching for executives.

Copies of our registrations and the current application’s Notice of Publication are attached (*See Exhibits A-C*) and can be easily verified on the U.S. Patent & Trademark Office website ([www.uspto.gov](http://www.uspto.gov)).

It has been brought to our attention that you have engaged in the unauthorized use of these trademarks. While the Company has used its **CoachSource®** mark since January 1, 2006, it is possible, albeit not probable that you were unaware that **CoachSource®** was registered. Or perhaps you misunderstood that professional coaching services for business executives in the

field of leadership fell within the “Featured Categories” on your website. Or maybe you forgot to do a search before developing your website and purchasing the [www.1coachsource.com](http://www.1coachsource.com) domain. Either way, we appreciate that mistakes can happen. Understandably, if something is not uppermost in our consciousness, it is easy to forget or lose sight of. We are sure you had no intent to violate CoachSource, LLC’s protected trademark rights. Either way, we believe that it is in our mutual interest to bring this matter to your attention.

The Company takes the protection of its intellectual property very seriously, and it is important that it exercise its rights to protect its brand, goodwill, and good name. I’m sure you would do the same if it were your valuable intellectual property. Both federal and state law support the Company’s position that your unauthorized use of a word that so closely resembles the Company’s protected trademark is an infringement.

As a business owner, you can understand how important it is that we protect and preserve our rights. For that reason, we request that you:

1. Discontinue all use of the word 1CoachSource on your website and other marketing materials, and discontinue the use of any other designation likely to cause confusion with CoachSource, LLC’s trademarks;
2. Destroy any materials in your possession or control bearing any designation likely to cause confusion with CoachSource, LLC’s trademarks;
3. Cancel your registration for the domain name [www.1coachsource.com](http://www.1coachsource.com) and any other domains that would cause confusion with CoachSource, LLC’s trademark, or transfer those domains to CoachSource, LLC.
4. Provide CoachSource, LLC with written confirmation that you have complied with the above request.

We request a response no later than Wednesday, May 24, 2017 indicating your intention to cooperate and by what date we can expect the changes to be implemented. I can be reached at 201-847-0442 or via email at [steve@coachsource.com](mailto:steve@coachsource.com). Thank you for your prompt attention to this matter.

Sincerely,

By: 

Stephen E. Sass

cc: Kimcee McAnally and Brian Underhill

Attachments



EXHIBIT A

# United States of America

## United States Patent and Trademark Office

### CoachSource Cloud

**Reg. No. 5,145,567**

**Registered Feb. 21, 2017**

**Int. Cl.: 42**

**Service Mark**

**Principal Register**

COACHSOURCE, LLC (NEW JERSEY LIMITED LIABILITY COMPANY)  
673 Dakota Trail  
Franklin Lakes, NJ 07417

CLASS 42: Software as a service (SAAS) services featuring cloud based software for tracking executive coaching engagements

FIRST USE 1-1-2010; IN COMMERCE 1-1-2010

THE MARK CONSISTS OF STANDARD CHARACTERS WITHOUT CLAIM TO ANY PARTICULAR FONT STYLE, SIZE OR COLOR

No claim is made to the exclusive right to use the following apart from the mark as shown:  
"CLOUD"

SER. NO. 87-085,414, FILED 06-27-2016  
MARIA VICTORIA SUAREZ, EXAMINING ATTORNEY



*Michelle K. Lee*

Director of the United States  
Patent and Trademark Office

EXHIBIT B

EXHIBIT A

**REQUIREMENTS TO MAINTAIN YOUR FEDERAL TRADEMARK REGISTRATION**

**WARNING: YOUR REGISTRATION WILL BE CANCELLED IF YOU DO NOT FILE THE DOCUMENTS BELOW DURING THE SPECIFIED TIME PERIODS.**

**Requirements in the First Ten Years\***

**What and When to File:**

- **First Filing Deadline:** You must file a Declaration of Use (or Excusable Nonuse) between the 5th and 6th years after the registration date. See 15 U.S.C. §§1058, 1141k. If the declaration is accepted, the registration will continue in force for the remainder of the ten-year period, calculated from the registration date, unless cancelled by an order of the Commissioner for Trademarks or a federal court.
- **Second Filing Deadline:** You must file a Declaration of Use (or Excusable Nonuse) and an Application for Renewal between the 9th and 10th years after the registration date.\* See 15 U.S.C. §1059.

**Requirements in Successive Ten-Year Periods\***

**What and When to File:**

- You must file a Declaration of Use (or Excusable Nonuse) and an Application for Renewal between every 9th and 10th-year period, calculated from the registration date.\*

**Grace Period Filings\***

The above documents will be accepted as timely if filed within six months after the deadlines listed above with the payment of an additional fee.

**\*ATTENTION MADRID PROTOCOL REGISTRANTS:** The holder of an international registration with an extension of protection to the United States under the Madrid Protocol must timely file the Declarations of Use (or Excusable Nonuse) referenced above directly with the United States Patent and Trademark Office (USPTO). The time periods for filing are based on the U.S. registration date (not the international registration date). The deadlines and grace periods for the Declarations of Use (or Excusable Nonuse) are identical to those for nationally issued registrations. See 15 U.S.C. §§1058, 1141k. However, owners of international registrations do not file renewal applications at the USPTO. Instead, the holder must file a renewal of the underlying international registration at the International Bureau of the World Intellectual Property Organization, under Article 7 of the Madrid Protocol, before the expiration of each ten-year term of protection, calculated from the date of the international registration. See 15 U.S.C. §1141j. For more information and renewal forms for the international registration, see <http://www.wipo.int/madrid/en/>.

**NOTE: Fees and requirements for maintaining registrations are subject to change. Please check the USPTO website for further information. With the exception of renewal applications for registered extensions of protection, you can file the registration maintenance documents referenced above online at <http://www.uspto.gov>.**

**NOTE: A courtesy e-mail reminder of USPTO maintenance filing deadlines will be sent to trademark owners/holders who authorize e-mail communication and maintain a current e-mail address with the USPTO. To ensure that e-mail is authorized and your address is current, please use the Trademark Electronic Application System (TEAS) Correspondence Address and Change of Owner Address Forms available at <http://www.uspto.gov>.**

EXHIBIT B

**Int. Cl.: 41**

**Prior U.S. Cls.: 100, 101 and 107**

**Reg. No. 3,539,223**

**United States Patent and Trademark Office**

**Registered Dec. 2, 2008**

**SERVICE MARK  
PRINCIPAL REGISTER**

**COACHSOURCE**

COACHSOURCE, LLC (NEW JERSEY LIMITED  
LIABILITY COMPANY)  
673 DAKOTA TRAIL  
FRANKLIN LAKES, NJ 07417

THE MARK CONSISTS OF STANDARD CHAR-  
ACTERS WITHOUT CLAIM TO ANY PARTICULAR  
FONT, STYLE, SIZE, OR COLOR.

FOR: PROFESSIONAL COACHING SERVICES  
FOR BUSINESS EXECUTIVES IN THE FIELD OF  
LEADERSHIP, IN CLASS 41 (U.S. CLS. 100, 101 AND  
107).

SER. NO. 76-687,945, FILED 3-21-2008.

FIRST USE 1-1-2006; IN COMMERCE 1-1-2006.

ROBIN CHOSID, EXAMINING ATTORNEY



---

**From:** TMOOfficialNotices@USPTO.GOV  
**Sent:** Tuesday, March 28, 2017 00:50 AM  
**To:** info@fwardattorney.com  
**Subject:** Official USPTO Notice of Publication Confirmation: U.S. Trademark SN 87218584: COACHSOURCE: Docket/Reference No. CS

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**TRADEMARK OFFICIAL GAZETTE PUBLICATION CONFIRMATION**

**U.S. Serial Number:** 87218584  
**Mark:** COACHSOURCE  
**International Class(es):** 009, 016, 041  
**Owner:** CoachSource, LLC  
**Docket/Reference Number:** CS

The mark identified above has been published in the Trademark Official Gazette (TMOG) on Mar 28, 2017.

**To Review the Mark in the TMOG:**

Click on the following link or paste the URL into an internet browser: <https://tmog.uspto.gov/#issueDate=2017-03-28&serialNumber=87218584>

On the publication date or shortly thereafter, the applicant should carefully review the information that appears in the TMOG for accuracy. If any information is incorrect due to USPTO error, the applicant should immediately email the requested correction to [TMPostPubQuery@uspto.gov](mailto:TMPostPubQuery@uspto.gov). For applicant corrections or amendments after publication, please file a post publication amendment using the form available at <http://teasroa.uspto.gov/ppa/>. For general information about this notice, please contact the Trademark Assistance Center at 1-800-786-9199.

**Significance of Publication for Opposition:**

- \* Any party who believes it will be damaged by the registration of the mark may file a notice of opposition (or extension of time therefor) with the Trademark Trial and Appeal Board. If no party files an opposition or extension request within thirty (30) days after the publication date, then eleven (11) weeks after the publication date a certificate of registration should issue.

To check the status of the application, go to [http://tsdr.uspto.gov/#caseNumber=87218584&caseType=SERIAL\\_NO&searchType=statusSearch](http://tsdr.uspto.gov/#caseNumber=87218584&caseType=SERIAL_NO&searchType=statusSearch) or contact the Trademark Assistance Center at 1-800-786-9199. Please check the status of the application at least every three (3) months after the application filing date.

To view this notice and other documents for this application on-line, go to [http://tsdr.uspto.gov/#caseNumber=87218584&caseType=SERIAL\\_NO&searchType=documentSearch](http://tsdr.uspto.gov/#caseNumber=87218584&caseType=SERIAL_NO&searchType=documentSearch). NOTE: This notice will only become available on-line the next business day after receipt of this e-mail.

# **EXHIBIT**

# **G**



775 E. Blithedale, Suite 325 | Mill Valley, CA 94941 | (415) 389-0975 | (415) 888-8235 [fax]

<http://fwardattorney.com> | [info@fwardattorney.com](mailto:info@fwardattorney.com)

Tuesday, July 11, 2017

1CoachSource  
[info@1coachsource.com](mailto:info@1coachsource.com)

Re: 1CoachSource

Dear 1CoachSource:

My name is Francine Ward, and my firm represents *CoachSource, LLC* (the “Company”), regarding its intellectual property law matters. The Company is a limited liability company formed under the laws of New Jersey and does business in more than fifty countries, within North America, Latin America, Europe, Africa, Asia, and Australia. Company is a one of the world’s most experienced leadership coaching firms, with clients that include well-known corporations, spanning a wide range of industries and business sectors throughout the world.

CoachSource, LLC is the owner of three United States Patent and Trademark Office (USPTO) registrations under the COACHSOURCE brand, all registered on the Principal Register:

- a. COACHSOURCE. (Reg. No. 3539223) In class 41 for professional coaching services for business executives in the field of leadership. Attached please find the Certificate of Registration issued on December 2, 2008;
- b. COACHSOURCE. (Reg. No. 5222152) In class 9, 16, 41. Attached please find the Certificate of Registration issued on June 13, 2017;
- c. COACHSOURCE CLOUD (Reg. No. 5145567) In class 42 for software as a service services featuring cloud based software for tracking executive coaching engagements. Attached please find the Certificate of Registration issued on February 21, 2017.

It has come to our attention that 1CoachSource is violating the Company’s rights in its registered family of trademarks by using a word so confusingly similar to Company’s CoachSource mark in connection with its offering of certain coaching services. Attached please find a screenshot of your website, Facebook page, and Twitter page.

Moreover, you have registered and continue to use the domain name [www.1CoachSource.com](http://www.1CoachSource.com) -- without the Company’s authorization. This domain name is confusingly similar to CoachSource’s distinctive and famous CoachSource mark. It is clear that you are acting with a bad faith intent to profit from the distinctive CoachSource brand.



Your prominent, open, and notorious use of the word 1CoachSource in this manner appears to be made with the intent to trade on the goodwill associated with the Company's CoachSource mark. Your unlawful use creates the false impression that 1CoachSource's coaching services originate from CoachSource, LLC, or that the Company is somehow connected or associated with you and 1CoachSource's coaching services, so as to deceive customers or to cause confusion or mistake as to the origin or affiliation of 1CoachSource and CoachSource, and their respective goods and services.

1CoachSource's use is also likely to dilute the distinctive quality of the Company's famous CoachSource mark. The attempted association of CoachSource, LLC's trademark with 1CoachSource's coaching services is likely to blur the distinctive character and tarnish the reputation of CoachSource's famous trademark.

The Company takes the protection of its intellectual property very seriously, and it is important that it exercise its rights to protect its brand, goodwill, and good name. I'm sure you would do the same if it were your valuable intellectual property. Both federal and state law support the Company's position that your unauthorized use of a word that so closely resembles the Company's protected trademark is an infringement.

As a business owner, you can understand how important it is that the Company protect and preserve its rights. For that reason, we request that you:

1. Discontinue all use of the word 1CoachSource on your website and other marketing materials, and discontinue the use of any other designation likely to cause confusion with CoachSource, LLC's trademarks;
2. Destroy any materials in your possession or control bearing any designation likely to cause confusion with CoachSource, LLC's trademarks;
3. Cancel your registration for the domain name www.1CoachSource.com and any other domains that would cause confusion with CoachSource, LLC's trademark, or transfer those domains to CoachSource, LLC.
4. Provide CoachSource, LLC with written confirmation that you have complied with the above request.

On May 10, 2017, Stephen Sass, Managing Partner and CFO of CoachSource, LLC sent you a letter requesting that you cease and desist the use of the term 1CoachSource. You seemingly have chosen to ignore his request. We therefore give you until this Friday, July 14, 2017 by 6pmEDT to indicate your intention to cooperate, and by what date we can expect the changes to be implemented. I can be reached at 415-389-0975 or via email at Francine@fwardattorney.com. Thank you for your prompt attention to this matter.

Kindly,

/Francine Ward/

Francine D. Ward, Esq.  
Attorney for CoachSource, LLC